



## **BOX Overview**

**May 2019**

## BOX - Overview

**Purpose:** In an effort to provide better file & document storage for the Academy of Neurologic Physical Therapy (ANPT) as well as collaboration among work groups, ANPT has determined that BOX is to be the chosen resource for SIGs, Committees and Task Force work. This document is to provide some general use information to users.

**What can be stored in ANPT BOX:** Files that pertain to the business of ANPT and its mission.

**What should NOT be stored in ANPT BOX:** Files or information that does not pertain to the business of ANPT. Users will not store confidential personal or patient information in the files.

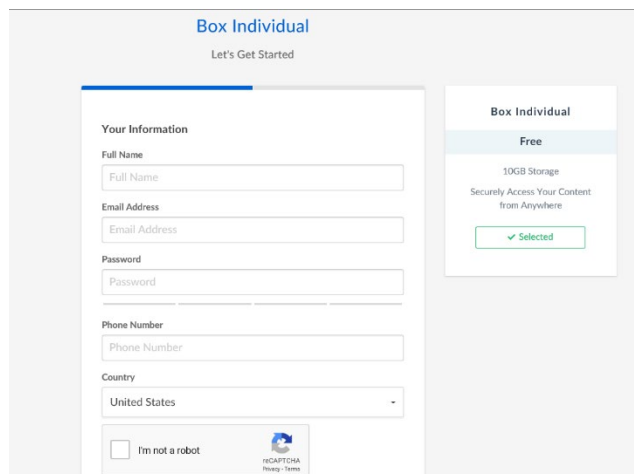
### Roles/Access:

Executive Office Staff: Admin rights to all files and can assist with setting up rights to folders

ANPT chair/co-chairs: have role of Co-Owner. They invite and provide access to their folder to work members.

## BOX - Set up

When an invitation has been sent to you to join a BOX folder or file this is the screen you will see when you accept the invitation. Fill out the information and submit




The screenshot shows the 'Box Individual' sign-up interface. At the top, it says 'Box Individual' and 'Let's Get Started'. The form is divided into two main sections. The left section, titled 'Your Information', contains fields for 'Full Name', 'Email Address', 'Password', 'Phone Number', and 'Country' (a dropdown menu currently showing 'United States'). At the bottom of this section is a checkbox labeled 'I'm not a robot' and a CAPTCHA image. The right section, titled 'Box Individual', shows a 'Free' plan with '10GB Storage' and the text 'Securely Access Your Content from Anywhere'. Below this is a green button with a checkmark and the word 'Selected'.


The next two screens are optional and you can skip by clicking at the bottom.

### Welcome to Box, Andrea Miller!

Let's personalize your experience.  
What do you mostly plan to use Box for?



FOR PERSONAL USE




FOR WORK

Next

Skip this and go straight to Box

### Collaborate with Others!

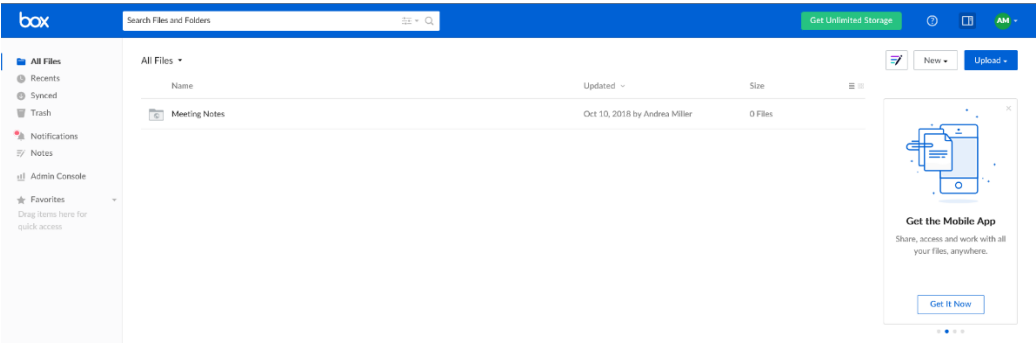
Box is built to help you work more efficiently with your team. Get your team up and running by inviting who you work with the most.



[Add another](#)

[Invite & Get Started](#)

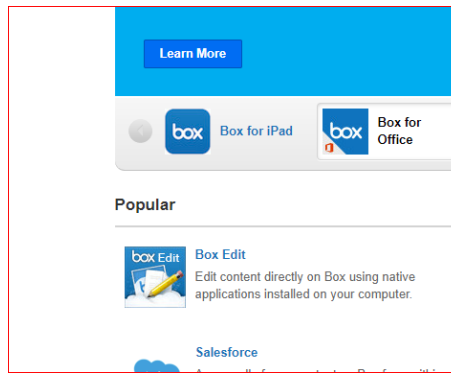
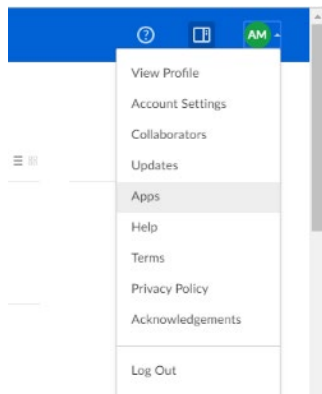
Now that you are in you should see the folder/file you were invited to along with any other folders/files you already have access to.



Supporting Browsers

Browser	Supported Version(s)
Firefox	The two latest, released versions
Chrome	The two latest, released versions
Safari	The two latest, released versions
IE	11
Edge	Not currently supported

In order edit without downloading document install BOX Edit App



## Plan Your Folder Structure – for Co-Owners of folders

Your team's needs will likely affect the way you manage your BOX account and how you set up the folder organization that is deployed to your team. BOX folders are the foundation from which your users work. Defining a folder structure that is intuitive and easy to navigate will greatly increase user adoption and maximize productivity. As you transition into BOX, it is important to ensure that poor practices and inefficient workflows from previous content management systems are not repeated.

### Folder Structure Best Practices:

Understanding BOX's folder permissions and collaboration features will help you configure your folder structure so your team can get the most out of BOX.

#### 1. More restricted content should live at a higher folder level.

You will invite other collaborators and external users further down the folder structure. Because of waterfall permissions, a user's access flows down to subfolders. Example if you give everyone access to Top Level folder they can see everything in all the under that folder. If they are on the Conference Committee giving them permission to that folder will allow them to see the files in that folder not all the other folders you have set up.

#### 2. Keep the structure as flat as possible.

A quick rule of thumb is to not design more than six levels of folders within your structure. A flat folder structure will be more efficient for organizing your content, and less frustrating for your users to navigate through.

#### 3. Ensure naming conventions of folder and files are extremely clear.

Users will be invited in at different folder levels, and that level will appear as their "root folder." Clear, consistent naming conventions will help the user stay oriented in the folder structure and will help with searching for content. Include dates on files for easy reference as to how new or old is a document. For example, being invited to a folder titled "Presentations – National Conferences" is more explanative than the title "Presentations". A file example is Movement Course 12.05.18.

**4. Every user's "All Files" page will look different depending on the folders they've created and/or the folders they've been invited into.** Reduce the number of folders on the "All Files" page by inviting users into department or team folders. Or, make your users aware of the Favorites page so your users can "favorite" the folders they most often work within, to easily navigate to those folders.

**5. Create separate folders for external collaboration.**

These can be subfolders under a client folder, or they can be separate root level folders depending on the needs of your organization. Be sure to label all public/external folders appropriately so your users understand that content in those folders will be viewed by third parties.

## Inviting Collaborators

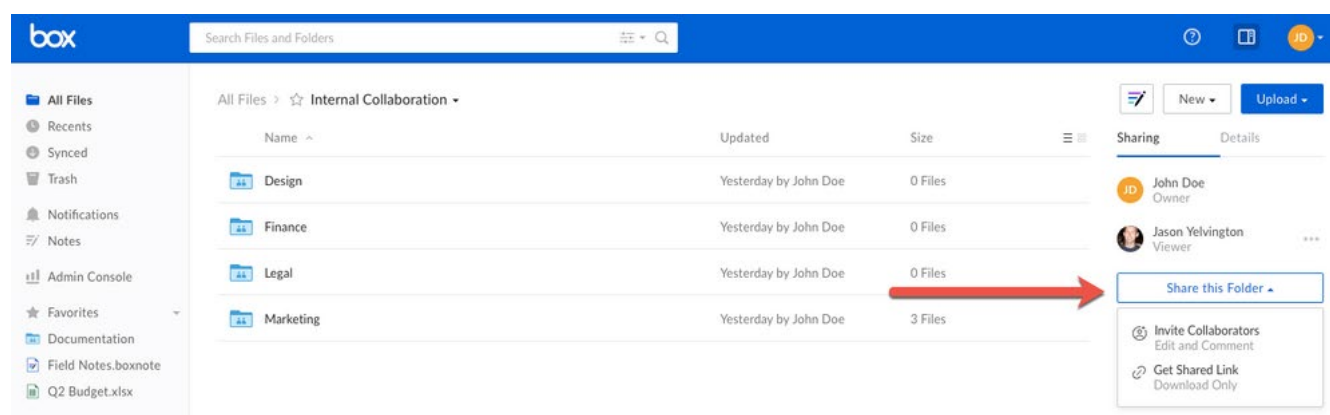
This step can only be done by ANPT Executive Office staff or a Co-Owner or of a folder. Individuals may send invites on files.

A **collaborator** is an individual who has been invited into a file or folder. When a user is added to a file or folder as a collaborator, the item will appear in their **All Files** page.

If you send a collaboration invitation to a person without a BOX account, that person will be prompted to sign up with BOX before being able to access the content. (See page 2 on how to set up an account)

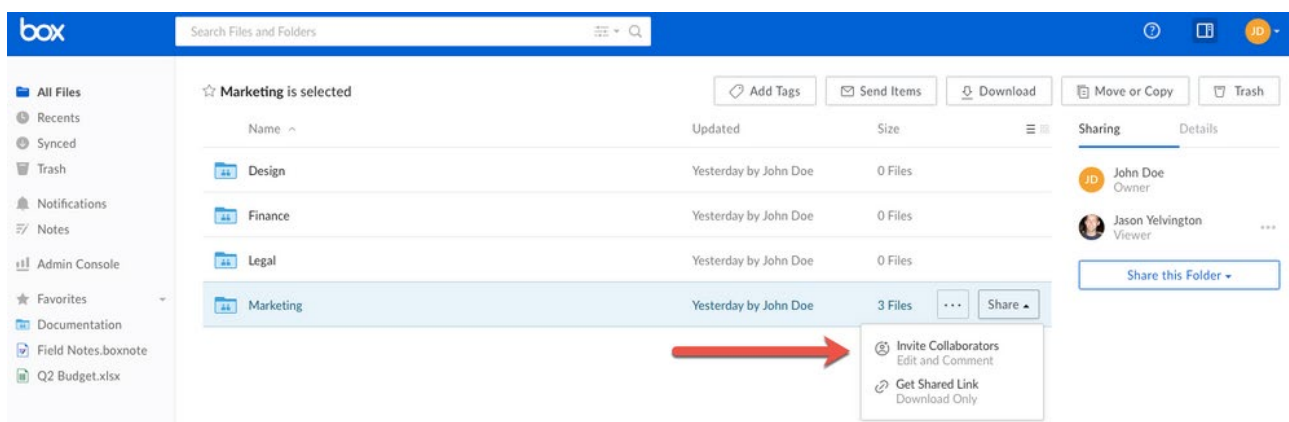
### To invite a collaborator into a folder:

- Open the folder in which you'd like to invite collaborators
- In the **Sharing** tab of the right-hand sidebar, click **Share this Folder**
- In the dropdown that appears, click **Invite Collaborators**



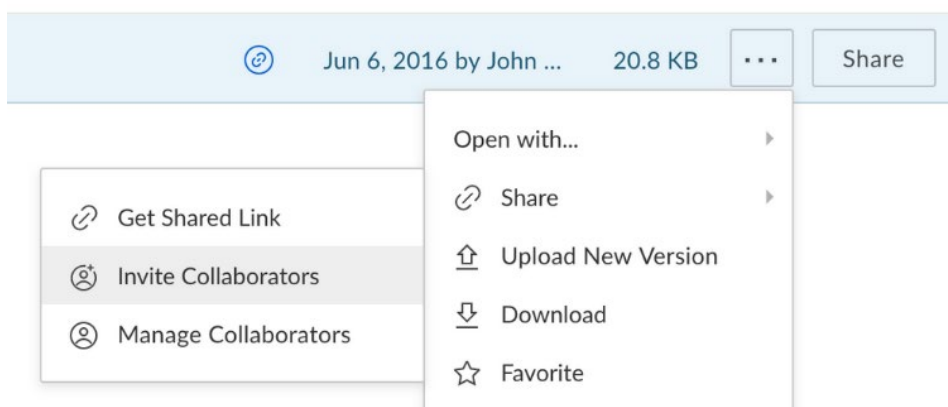
Alternatively, you can:

- Locate the folder in which you'd like to invite collaborators
- Click **Share** to the right of the folder name
- In the dropdown that appears, click **Invite Collaborators**



## To invite a collaborator into a single file:

- Open the folder in which the file is located
- Right click the file or click the ellipses (...) to open the More Options menu
- Click Share
- Select Invite Collaborators
- Once you have invited collaborators to the file, the Collaborator badge will be displayed beside the file's name.



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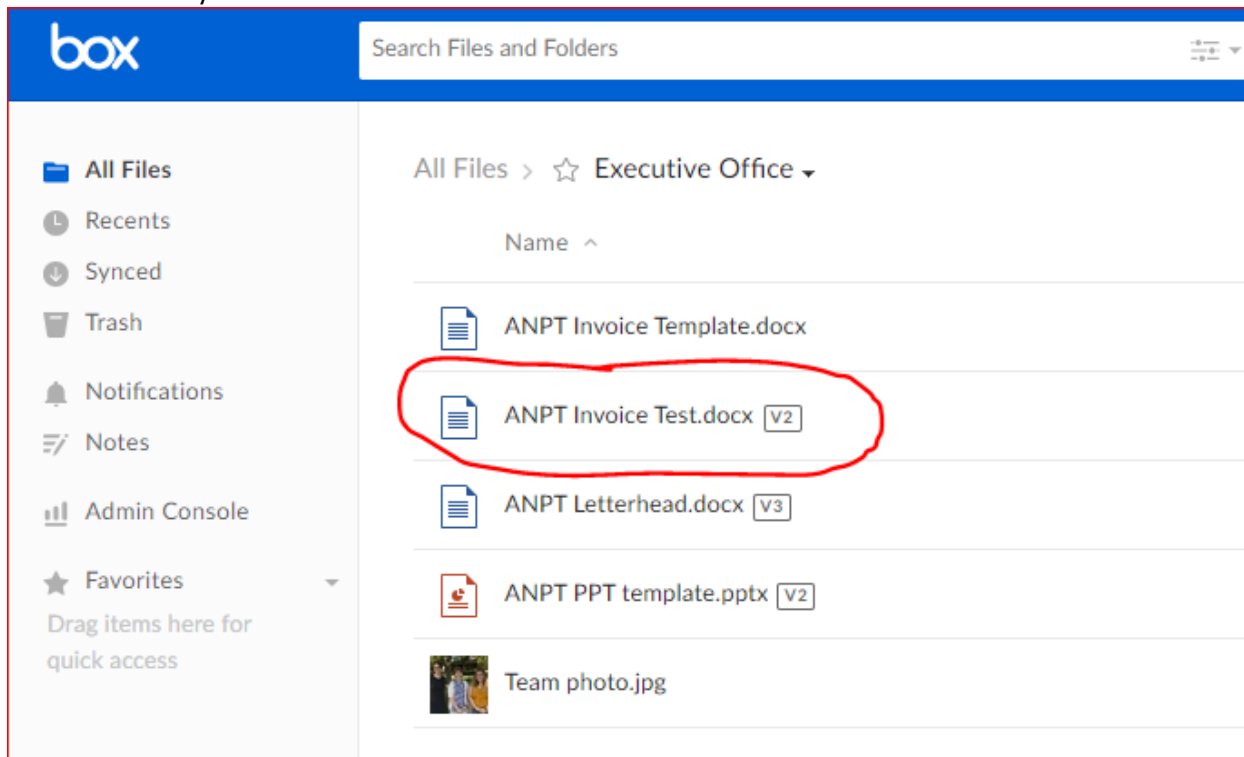
### Notes:

- When inviting collaborators to a single file, the only available access level is **Editor**. Users can change this access level to **Viewer** from the **Manage Collaborators** page. These are the only access levels available for collaborators on a single file.
- All collaboration settings configured by enterprise admins apply to both single files and folders.

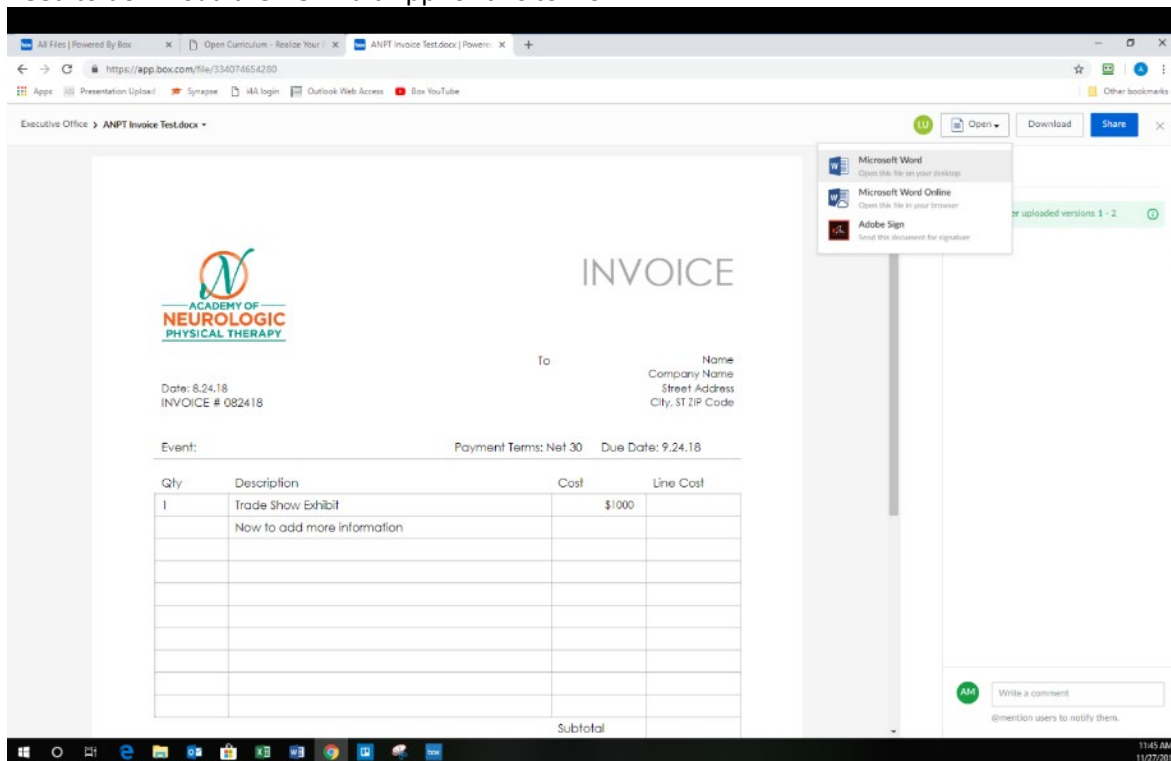
## Editing

Click on the file you want to edit

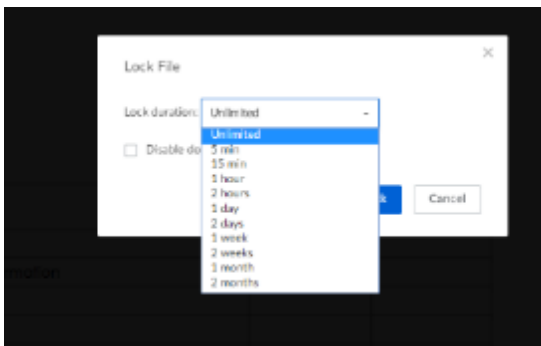
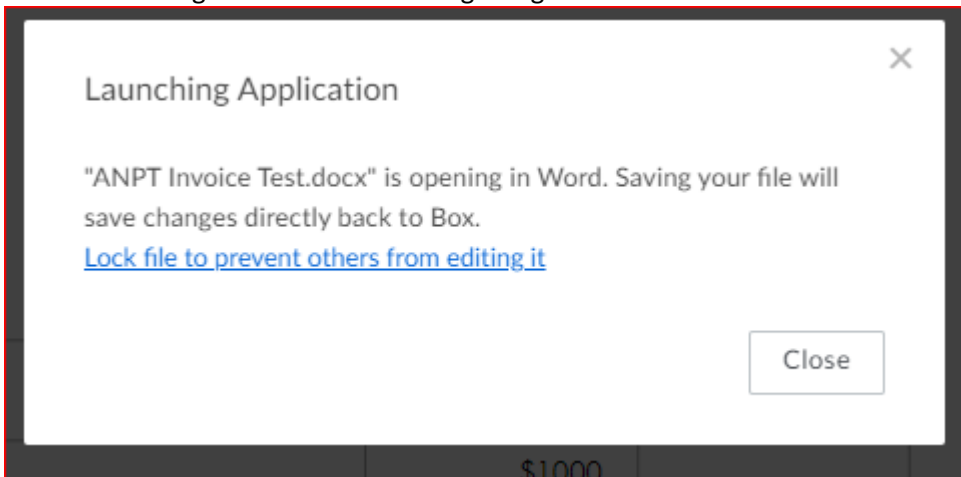
Click on the file you want to edit



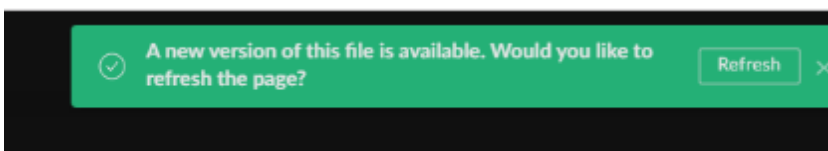
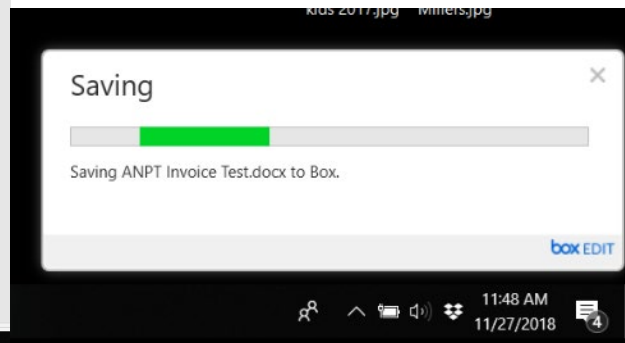
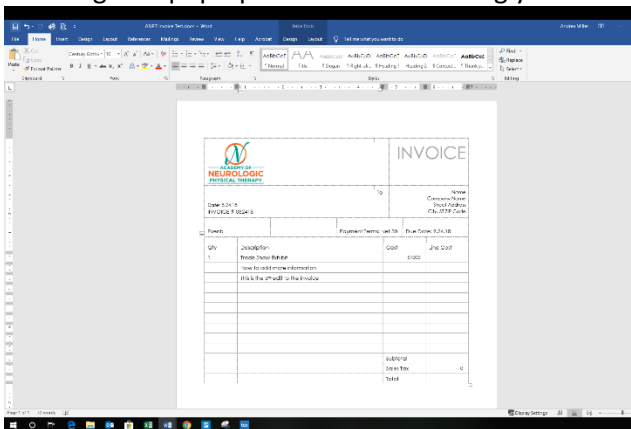
Once you can view it in the upper right corner click the Open button and select the first option for editing. You need to download the BOX Edit App for this to work.



When opening the file this will pop-up. If you want to ensure no one else is making edits when you are working on the file you can lock the file by clicking on the highlighted line. This is recommended so multiple versions are not created. When you lock a file everyone else who has access to the file their Open button will grey out until your unlock time expires. Those who have Editor rights can unlock the file so no need to worry about someone locking it for months and forgetting about it.

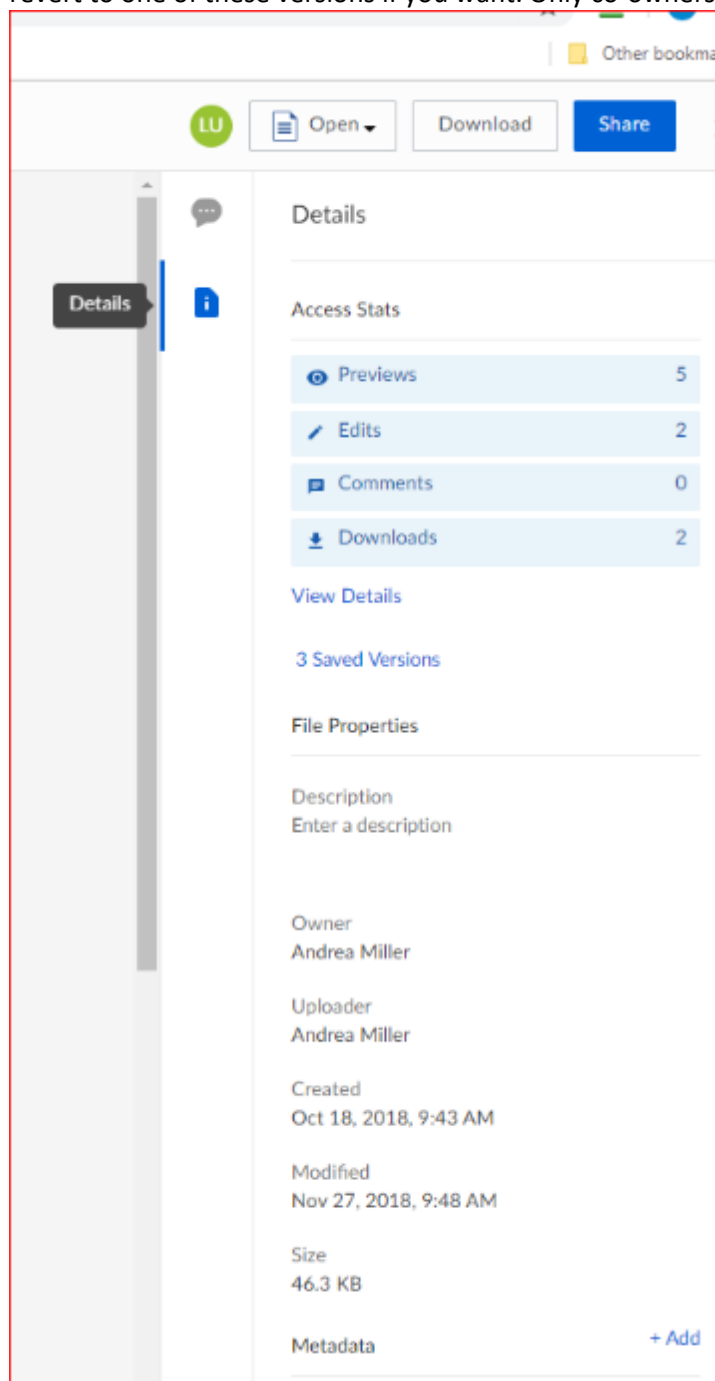


Once you have made your edits Save the document. You will get a pop-up notifying you this is being saved to BOX. A green pop-up will also show asking you to refresh so you are seeing the latest version.





When you are in a file you can also see the history of the document and go back to previous versions by clicking on the blue 'i' button'. In the Saved Versions you can see all the versions of this document. You can revert to one of these versions if you want. Only co-owners or editors can make that change.

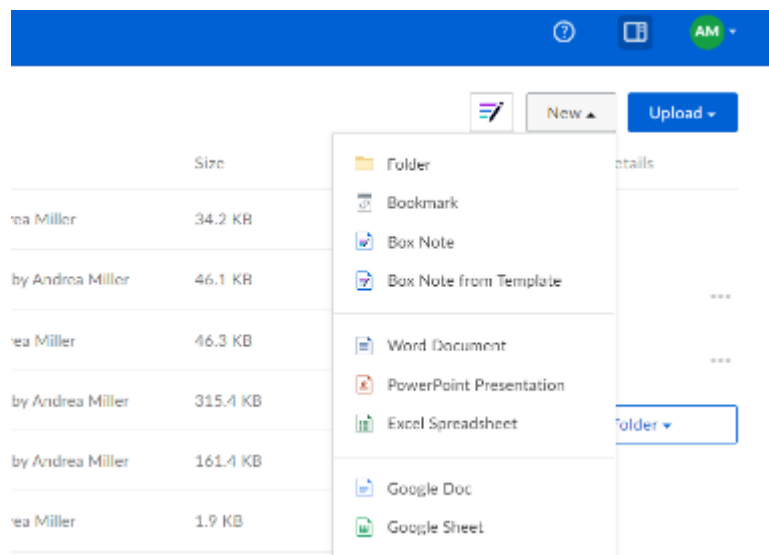


When you are in editing a file in the lower right corner of the page there is an area to write comments and if you want the comment emailed to someone who is listed in the folder/file put the @ symbol and their name. You can also assign a task by clicking the Add Task BOX. This too will send them an email and then notify you when they have completed or declined the task.

The screenshot shows a comment box with a green circular icon containing 'AM'. The comment text reads: "This version will be emailed Friday. Any edits please make by Thursday EOD @Ali Carlson". Below the comment is a checkbox labeled "Add Task" with an information icon. Underneath is a section titled "Assignees" with a text input field labeled "Add an assignee". Below that is a section titled "Due Date (optional)" with a date picker labeled "Select a date". At the bottom are two buttons: "Cancel" and "Post".

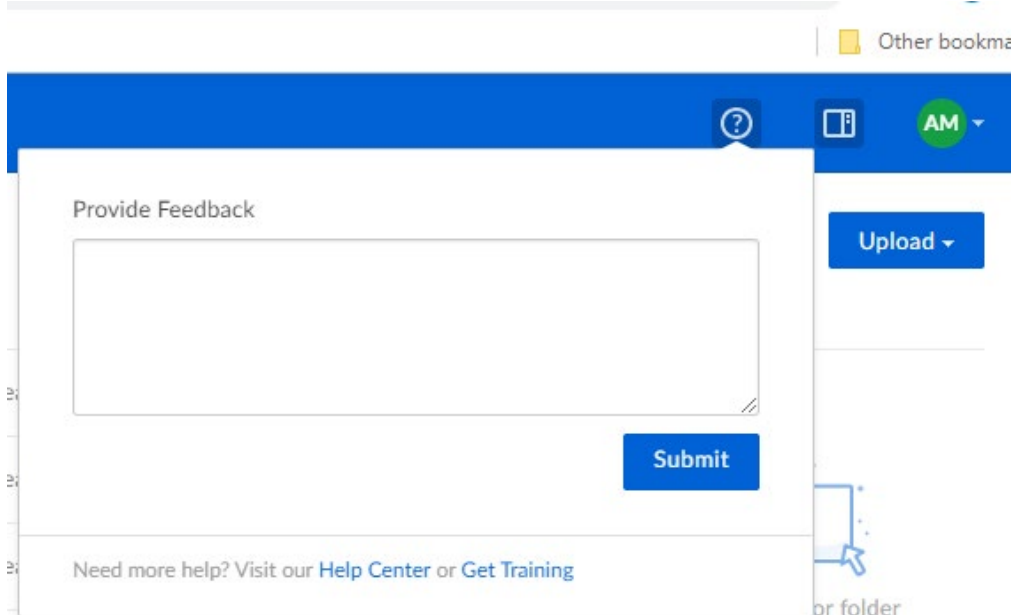
## Real time co-editing

To have multiple people work on a document together create the document in BOX Note under the New button in the upper right corner. There are templates or you can open a blank document. When you invite people to edit this document it will allow all of you to be in it at once. Great for creating an agenda or project plan together. You can designate one person to make the changes or everyone can type. It will auto save every few seconds.



## Resources:

BOX has many resources self-paced guides, free webinars, how-to documents and Q/A section. Click on the ? in top right corner and then click on Help Center or Get Training



## BoxDrive

Once your online account has been set up, we suggest you download BoxDrive. Once downloaded, this software will look and operate like a shared drive. You will be able to access box and open and save documents directly from your desktop.

## Adding users

If you add a folder or document directly from BoxDrive, you will be the only one able to access it, you will be the owner. To add more viewers, editors you must log into your account online and edit the users from there.

## Download here

<https://www.box.com/resources/downloads>

Download the optimal version for your computer.

DESKTOP APPS

## Box Apps for Desktop



### Box Drive for Mac

Access all your Box files directly from your desktop, taking up very little hard drive space

Natively integrated into Mac Finder

Easily share and collaborate on files

[DOWNLOAD NOW](#)



### Box Drive for Windows

Access all your Box files directly from your desktop, taking up very little hard drive space

Natively integrated into Windows Explorer

Easily share and collaborate on files

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